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This bulletin summarizes information from the City of Toronto's Land Use Information System II, providing an overview of the development projects received by the City Planning Division between June 1, 2006 and December 31, 2010. It illustrates how the City has grown since the Official Plan came into force in June 2006 and how it will continue to develop over time. This bulletin can be found on the City of Toronto's website at www.toronto.ca/planning/grow.htm

profile TORONTO

June 2011

How Does the City Grow?

Highlights

Toronto continues to grow with strong development prospects helping to bring more people and jobs into the city.

- Over 100,000 residential units and 4.23 million m^2 of non-residential GFA were proposed in the City of Toronto between June 1, 2006 and December 31, 2010.
- 80% of this new development is proposed in areas targeted for growth by the City's Official Plan.
- 58,217 new residential units were constructed in Toronto between 2006 and 2010.
- The Downtown & Central Waterfront area is the heart of growth in the City with strong residential and office development.
- North York Centre is a successful secondary node for development in the City.
- Almost 30,000 of the units proposed between June 1, 2006 to December 31, 2010 were proposed in the corridors known as 'the Avenues' in the Official Plan
- 40% of the City's non-residential floor space proposed between June 1, 2006 and December 31, 2010 were in the Official Plan's Employment Districts.
- 90,000 units and 2.82 million m^2 of non-residential floor space proposed between June 1, 2006 and December 31, 2010 have not yet been built. Toronto will continue to grow as this proposed development receives approval and building permits.

Introduction

The City of Toronto, as Canada's most populous city, is a focal point of development, growth and urbanization. Toronto has recently experienced a surge of both residential and non-residential growth with construction cranes a constant presence on the City's skyline. This bulletin is an update to one published in April 2007 and examines how and where the City has been growing and how it will continue to develop over the next ten to twenty years.

Toronto's Official Plan, which came into force in June 2006, is the road map for how the City will develop over the next 20 years. Its central geographic theme is to direct growth to appropriate areas and away from the City's stable residential neighbourhoods and green spaces. New development will be targeted to only about 25% of the City's lands, while the remaining 75% will be protected from significant intensification. The locations recognized as being most appropriate for growth are those identified in the Official Plan's Urban Structure Map as Avenues, Centres, the Downtown[1] and Employment Districts, as well as other areas in the City designated as Mixed Use and Employment Areas. The Official Plan's Urban Structure Map is included in this bulletin as Map 1 on page 2.

Population and Employment

Before examining development across the City, it is important to understand Toronto's growth in the context of its population and employment. The Growth Plan for the Greater Golden Horseshoe, adopted in June 2006 by the Ontario Ministry of Public Infrastructure and Renewal, is the Province's plan to coordinate growth and development throughout the region that stretches around Lake Ontario from Niagara Falls to Peterborough, with Toronto at its centre. The Growth Plan forecasts 3.08 million people and 1.64 million jobs in the City of Toronto by 2031.[2]

Statistics Canada estimated Toronto's population to be 2.72 million people in July 2010, up from 2.61 million in 2006.[3] If we apply this 2010 population to the Growth Plan's forecasts, Toronto will need to grow by approximately 17,000 people each year to reach the forecasted population by 2031. Between 2006 and 2010,

1. For the purposes of this bulletin, any reference to the Downtown includes the Central Waterfront Area.
2. By provincial legislation, the Official Plan must conform to the policies of the Growth Plan. Toronto's Official Plan contemplates the city having 1.85 million jobs and 3 million people by 2031. An Official Plan Amendment (OPA 72) that updates these numbers and brings them into conformity with the Growth Plan was appealed to the Ontario Municipal Board.
3. Statistics Canada, Annual Demographic Statistics, 91-214-X

Map 1: Official Plan Urban Structure Map

Toronto grew by an average of 27,500 people each year, so we are well on our way to reaching this forecasted population.

Statistics Canada's Census also records where people are working. These data include people working at home and those with no usual place of work. Since the census is conducted every five years, we have information from 2006 but no information for 2010. The total number of jobs from the three most recent censuses are shown in Table 1. With 1.47 million jobs in 2006, Toronto will need to add approximately 6,800 new jobs each year between 2006 and 2031 to reach the Growth Plan forecast of 1.64 million jobs by 2031.

In the ten years between 1996 and 2006, Toronto added an average of 17,700 jobs each year, although this does not include the recessions that occurred both before and after this time frame. If we look at the five year interval of 2001-2006, an average of 7,700 jobs were added each year.

Table 1: City of Toronto Jobs

Year	No. of Jobs
1996	1,293,000
2001	1,432,000
2006	1,470,000

Source: calculated from Statistics Canada Census "Place of Work" data

Toronto Housing and the GTA

Toronto has represented an average of approximately 30% of the housing completions in the Greater Toronto Area since 1981, according to CMHC data shown in Table 2. As seen in Figure 1, while most of the nineties represent a low point in new housing in the GTA, Toronto has been recovering since 1999 and is now producing more new dwelling units than it was during the last peak in the late eighties.

Table 2: : Dwelling Completions, GTA

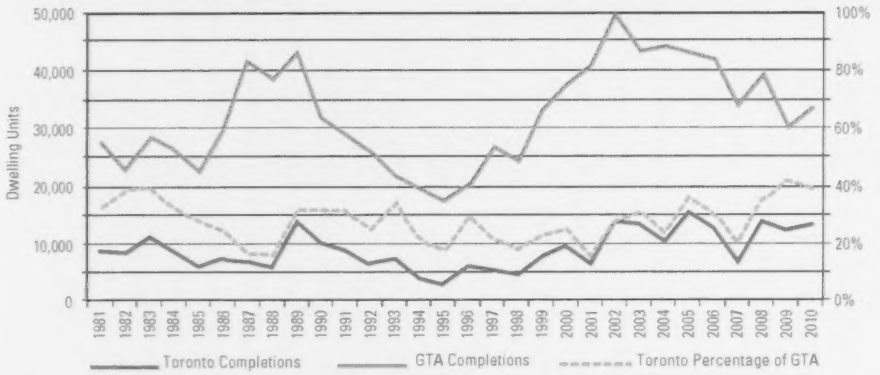
Year	Toronto	Total GTA	Toronto % of GTA
1981-1985	42,942	127,224	33.8%
1986-1990	44,037	184,777	23.8%
1991-1995	29,500	112,853	26.1%
1996-2000	32,517	140,983	23.1%
2001-2005	58,763	219,839	26.7%
2006-2010	58,217	177,801	32.7%
Total	**265,976**	**963,477**	**27.6%**
Avg/Year	8,866	32,116	

Source: CMHC, Monthly Ontario Housing Market Reports

The City continues to be an exceptionally attractive location for residential development in the GTA, especially for high-density condominium apartments. CMHC recorded a total of 58,217 residential units completed in Toronto between 2006 and 2010 and about 75% of these units were condominium apartments.[4]

For each of these years except one, Toronto had the highest number of completions within the region.

Figure 1: Toronto and GTA Dwelling Unit Completions



Source: CMHC, Monthly Ontario Housing Market Reports

Toronto's Proposed Development

Toronto's development industry is strong and continually invests in new projects in the City. In the 4½ years after the Official Plan came into force, 1,696 development projects, with 106,848 residential units and over 4.23 million m^2 of non-residential GFA proposed, have been submitted to the City Planning Division for approval. All these projects and the proposed development data covered in this bulletin were received from June 1, 2006 to December 31, 2010.

Most of the development proposed in the City is occurring in areas that the Official Plan has targeted for growth. Table 3 contains the breakdown of residential and non-residential development proposed in these targeted growth areas, as well as the stages of development. As seen in Figure 2, since the Plan came into force, 80% of the residential units were proposed to be

4. Canada Mortgage and Housing Corporation, Ontario Housing Market Reports

built in the Downtown, in the Centres, along the Avenues, and in other Mixed Use Areas throughout the City. Close to half of the non-residential GFA was also proposed in these areas (Figure 3). Most of the other half was proposed in the Employment Districts or other Employment Areas which the Official Plan also targets for growth.

The residential projects proposed in the targeted growth areas are generally larger than those proposed in the other areas of the city, as seen in Figure 4. The projects in the Centres have the largest average number of residential units proposed, while those outside of the Downtown, Centres, Avenues or other Mixed Use Areas have the smallest average number of units. The residential projects in these other areas are mainly designated as Neighbourhoods in the Official Plan and are not targeted for growth, although planning approval is required for some replacement or infill housing. The other areas also include locations designated as Employment Areas where residential development is not encouraged.

City Council has approved over 20,000 residential units in each of the last five years, and a large proportion of the development proposed in the last five years has not yet been built, indicating a continuation of strong construction activity in Toronto in the coming years. Across the city, 84% of the proposed residential units and 67% of the non-residential GFA proposed between June 2006 and December 2010 do not have any building permits issued. This amounts to 90,000 units and 2.82 million m^2 of non-residential GFA. Based on housing activity over the past 30 years, this represents about ten years of market demand for residential development.

Downtown

The Downtown and Central Waterfront area is one of the driving forces of development in the City of Toronto. Over 34,500 units and 977,000 m^2 of non-residential GFA were proposed in the area between June 2006 and December 2010. This is almost one-third of the residential units and one-quarter of the non-residential GFA proposed in the entire city. Map 2 shows the distribution of residential units and non-residential GFA throughout the Downtown. A large portion of the residential development is proposed

Figure 2: Location of Proposed Residential Units

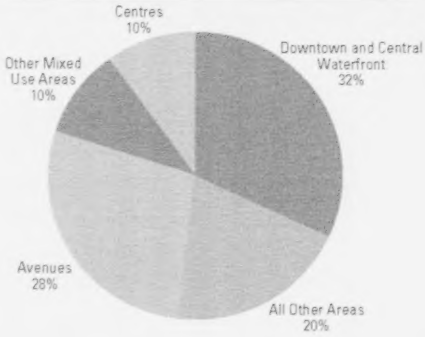


Figure 3: Location of Proposed Non-Residential GFA

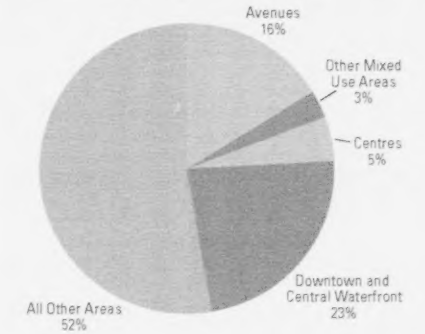


Table 3: Proposed Development in City of Toronto

Applications Received between June 1, 2006 and December 31, 2010

	Number of Projects	% of Projects	Proposed Residential Units	% of Proposed Res Units	Proposed Non-Residential GFA (m^2)	% of Prop. Non-Res GFA
City of Toronto	**1,696**		**106,848**		**4,231,517**	
Growth Areas						
Downtown and Central Waterfront	204	12.0%	34,533	32.3%	977,153	23.1%
Centres	55	3.2%	11,298	10.6%	225,838	5.3%
Etobicoke Centre	*12*	*21.8%*	*2,333*	*20.6%*	*46,641*	*20.7%*
North York Centre	*26*	*47.3%*	*4,113*	*36.4%*	*81,269*	*36.0%*
Scarborough Centre	*9*	*16.4%*	*3,684*	*32.6%*	*49,798*	*22.1%*
Yonge/Eglinton Centre	*8*	*14.5%*	*1,168*	*10.3%*	*48,130*	*21.3%*
Avenues	246	14.5%	29,463	27.6%	661,934	15.6%
Other Mixed Use Areas	104	6.1%	10,240	9.6%	134,963	3.2%
All Other Areas	1,087	64.1%	21,314	19.9%	2,231,628	52.7%
Stage of Development						
Projects Submitted (not approved)	490	28.9%	53,219	49.8%	1,347,671	31.8%
Projects Approved (no permits issued)	472	27.8%	36,790	34.4%	1,472,440	34.8%
Projects with Permits Issued	734	43.3%	16,839	15.8%	1,411,406	33.4%

Source: City of Toronto, City Planning: Land Use Information System.

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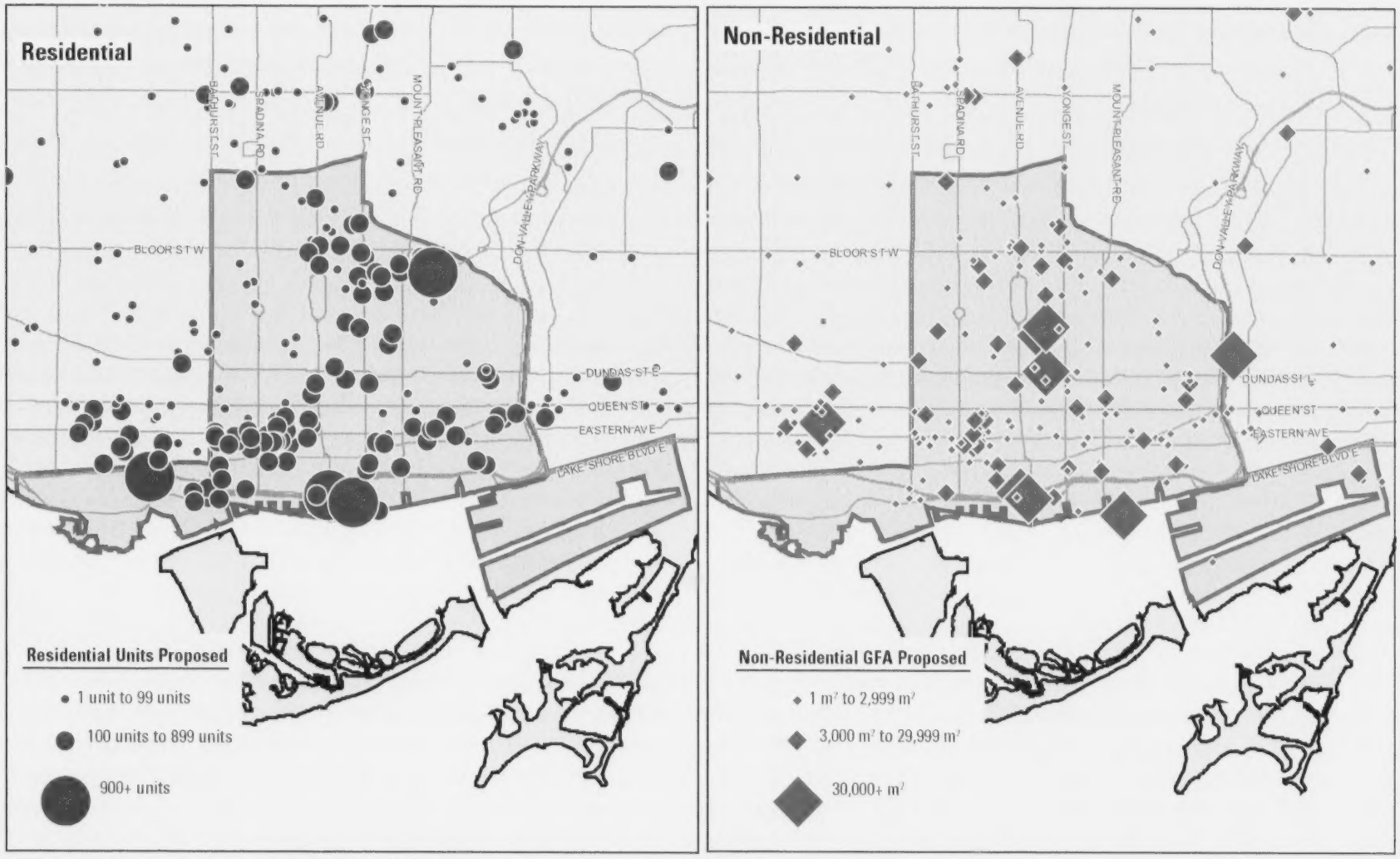
Map 2: Downtown and Central Waterfront Development Activity



Development Projects Received between June 1, 2006 - December 31, 2010

Source: Land Use Information System II

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south of Queen St, with another large cluster of units in the vicinity of Bloor St and Yonge St. The non-residential development is more dispersed throughout the area with large projects occurring between University Ave and Yonge St, north of Dundas St W, as well as south of Front St, west of York St.

Centres

The four Centres are focal points of transit and infrastructure that are vital to the City's growth management strategy. The 55 projects proposed in the Etobicoke, North York, Scarborough and Yonge-Eglinton Centres are shown in Map 3. These projects contain 10.6% of the City's proposed residential units. About 11,300 units and 226,000 m^2 of non-residential GFA are proposed here. North York Centre has the most activity occurring within its boundaries with 47% of the projects, and 36% of both the residential units and non-residential GFA proposed in the Centres. Scarborough Centre also has a number of large projects with a total of 3,684 residential units and 49,800 m^2 of non-residential GFA, all proposed in only nine projects.

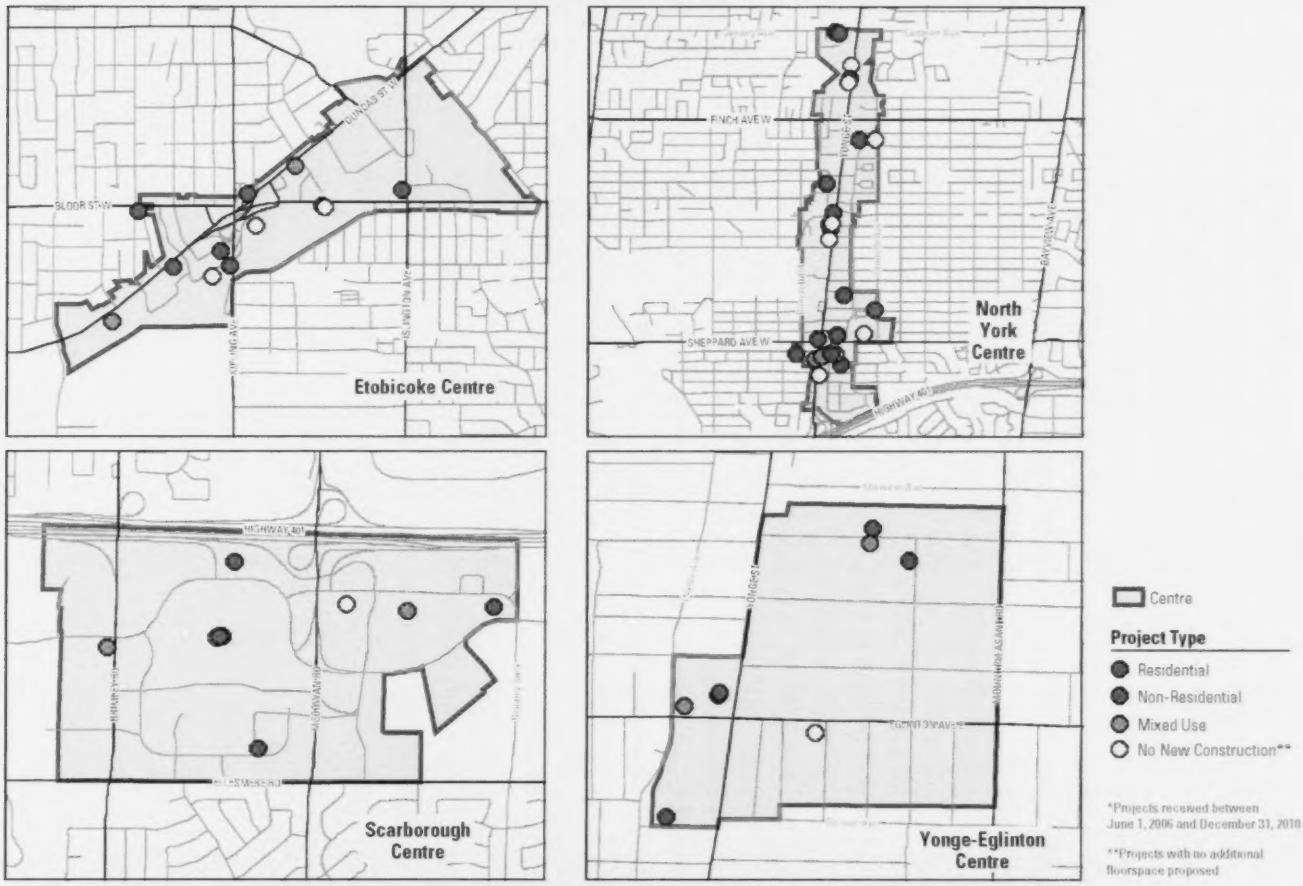
Avenues

The Avenues are corridors along major streets which are expected to re-develop incrementally over time. They have been an effective alternative to the Downtown and the Centres with 29,463 units and 662,000 m^2 of non-residential GFA proposed since June 2006. This is almost 30% of the City's proposed units and 16% of its non-residential GFA.

Other Mixed Use Areas

Besides the Downtown, Centres and Avenues, there are numerous other locations throughout the City that are also designated as Mixed Use Areas, which encourage a broad range of commercial, residential and institutional uses, such as local shopping areas around minor arterial roads. These additional Mixed Use Areas have another 10,240 units and 135,000 m^2 of non-residential GFA proposed. Together, these projects, and those proposed on the Avenues, represent about 21% of all the projects in the City and close to 800,000 m^2 of non-residential GFA. This is only about 180,000 m^2 less than that proposed for the Downtown and Central Waterfront area.

Map 3: Development Projects* in Centres



*Projects received between June 1, 2006 and December 31, 2010

**Projects with no additional floorspace proposed

Source: Land Use Information System II

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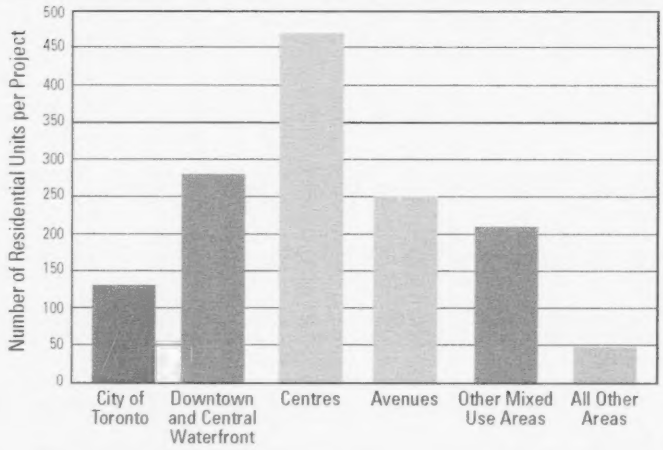
All Other Areas

About 21,000 units or 20% of the units proposed in the City are outside of the growth areas – the Downtown, Centres, Avenues and other Mixed Use Areas. These projects are generally smaller replacement or infill projects, as shown in Figure 4, in areas designated as Neighbourhoods. Over 2.23 million m^2 of non-residential GFA is also proposed in these other areas, but most of it is in the Employment Districts or other Employment Areas which the Official Plan targets for non-residential growth.

Figure 4: Average Size of Residential Projects



Employment Districts

Each of Toronto's seventeen Employment Districts has a unique employment character and many are undergoing a gradual shift in focus from the traditional manufacturing setting to a more diverse employment structure. That being said, the manufacturing sector continues to account for about 31% of all the jobs in the Employment Districts.[5] These Employment Districts are also attractive locations for the creation of new, small businesses.[6] With 1.64 million jobs forecasted for the City of Toronto by 2031, the protection and enhancement of the Employment Districts is vital to the city's economic health.

The development proposed in the Employment Districts will help the City reach its forecasted growth potential. The proposed development in each Employment District is presented in Table 4. The Employment Districts hold 1.66 million m^2, or almost 40%, of the city's proposed non-residential GFA (Map 4). While overall employment in these districts has been declining for a number of years, this new development could bring new life and new jobs to many of these areas. Over the next

Table 4: Proposed Development in Employment Districts

Applications Received between June 1, 2006 and December 31, 2010

	No. of Projects	% of Projects Projects	Proposed Non-Residential GFA (m^2)	% of Prop. Non-Res GFA
City of Toronto	**1,696**		**4,231,517**	
District				
Total Employment Districts	**246**	**14.5%**	**1,660,492**	**39.2%**
Airport Corporate Centre	1	0.4%	16,850	1.0%
Don Valley Parkway Corridor	42	17.1%	184,069	11.1%
Dufferin Keele North	15	6.1%	97,156	5.9%
Dufferin Keele South	10	4.1%	24,968	1.5%
Highway 400 Corridor	23	9.3%	83,262	5.0%
Liberty	10	4.1%	14,517	0.9%
Milliken	9	3.7%	26,464	1.6%
North West Etobicoke	8	3.3%	27,040	1.6%
Rexdale	18	7.3%	553,067	33.3%
Scarborough Highway 401 Corridor	16	6.5%	68,940	4.2%
South East Scarborough	1	0.4%	276	0.0%
South Etobicoke	29	11.8%	205,685	12.4%
South of Eastern	3	1.2%	20,820	1.3%
South West Scarborough	17	6.9%	63,106	3.8%
Tapscott/Marshalling Yard	29	11.8%	188,633	11.4%
West Central Scarborough	13	5.3%	9,476	0.6%
Weston Road/Junction	2	0.8%	76,164	4.6%
Stage of Development				
Projects Submitted (not approved)	75	30.5%	535,201	32.2%
Projects Approved (no permits issued)	86	35.0%	810,373	48.8%
Projects with Permits Issued	85	34.6%	314,919	19.0%

Note: The Employment Districts table can not be directly compared with Table 3: Proposed Development in City of Toronto because some Employment Districts contain Avenues. This table does not include projects with Mixed Use land use designation in Employment Districts.

Source: City of Toronto, City Planning, Land Use Information System.

5. City of Toronto, City Planning, Toronto Employment Survey, 2010.
6. City of Toronto, City Planning, Employment Districts Profile, July 2010.

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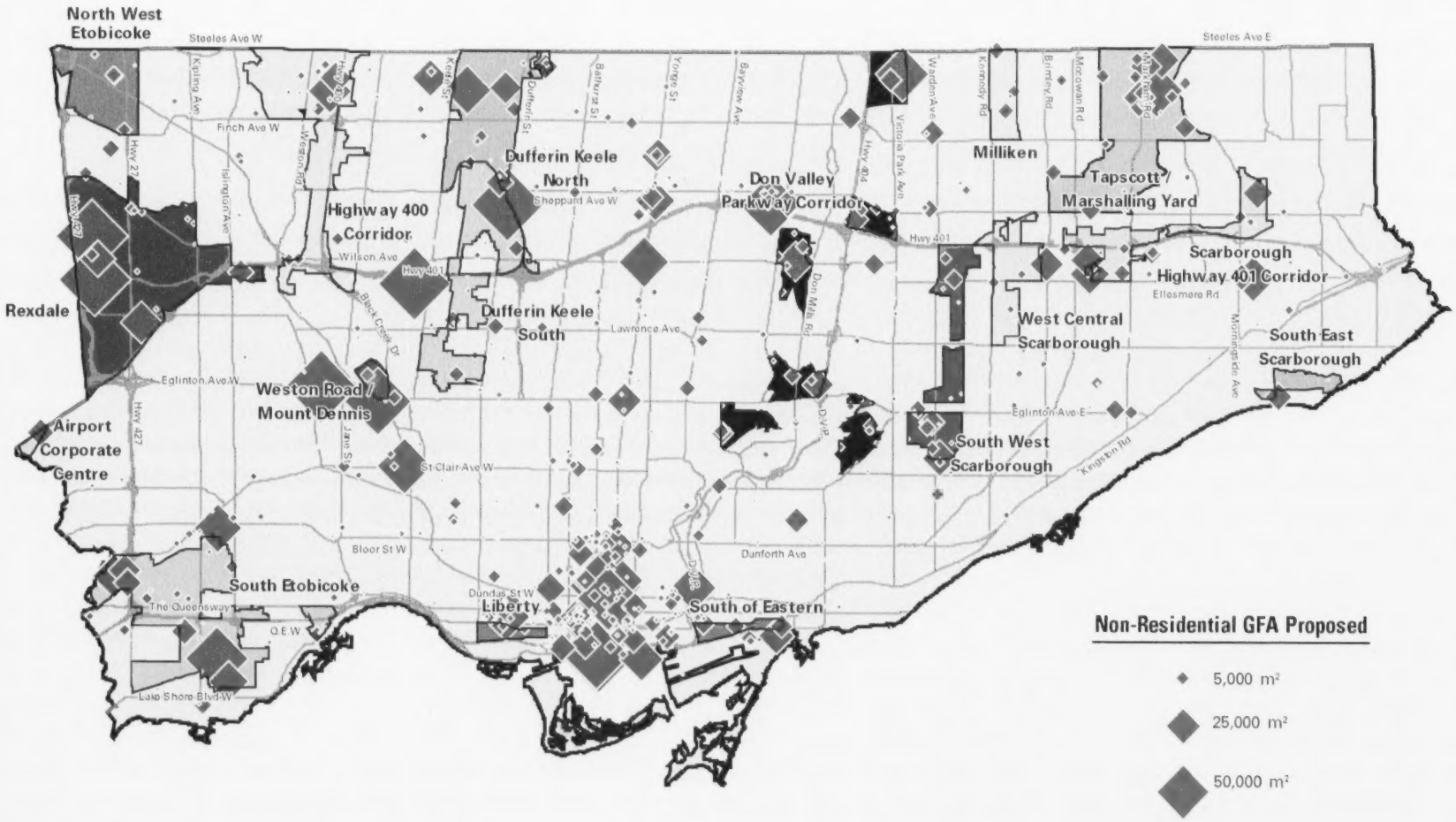
Map 4: Non-Residential Development and Employment Districts, City of Toronto



Development Projects Received between June 1, 2006 - December 31, 2010

Source: Land Use Information System II

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few years, construction is expected to commence on many of the proposed projects since about half of the proposed non-residential GFA in the Employment Districts have been approved, but does not yet have building permits issued.

Over two-thirds of the non-residential development proposed in the Employment Districts is concentrated in four Districts. The largest non-residential project proposed in the City is the "Woodbine Live!" development in the Rexdale Employment District, with over 300,000 m^2 of non-residential GFA as well as 2,500 new residential units proposed. It will transform an area that lost over 8,000 jobs between 2006 and 2010, or 17% of its 2006 employment base. The other three Employment Districts with significant amounts of non-residential GFA proposed are Tapscott/Marshalling Yard, Don Valley Parkway Corridor, and South Etobicoke, which account for a further 578,387 m^2 of non-residential GFA, or 14% of that proposed in the entire City.

Priority Area Neighbourhoods

Toronto has identified thirteen neighbourhoods as having priority for infrastructure and social service investment, to help support the most vulnerable communities in the City. Targeting resources, services and facilities to these areas will help improve outcomes for the neighbourhoods' residents and assist in building strong and healthy communities. There are 162 development projects proposed in the City's thirteen Priority Area Neighbourhoods. A breakdown of the residential and non-residential development proposed in each is shown in Table 5. These neighbourhoods contain almost 10% of the residential units and 8.5% of the non-residential GFA proposed in the entire city. Most of this development is proposed in five Priority Areas: Jane-Finch, Lawrence Heights, Scarborough Village, Steeles-L'Amoureaux, and Weston-Mt. Dennis. Map 5 displays the distribution of proposed residential units in the City as well as highlighting the Priority Area Neighbourhoods.

There is a combined total of almost 260,000 m^2 of non-residential GFA proposed in the Weston-Mt. Dennis, Jane-Finch, and Steeles-L'Amoureaux areas. This new non-residential GFA can potentially create new employment opportunities for the people living in these Priority Areas and help to stimulate further growth. There are also over 1,000 new residential units proposed in each of the Steeles-L'Amoureaux and Weston-Mt Dennis areas, as well as in the Scarborough Village area. The Lawrence Heights Priority Area will also get a boost with the revitalization plans

Table 5: Proposed Development in Priority Neighbourhood Areas

Applications Received between June 1, 2006 and December 31, 2010

	No. of Projects	% of Projects	Proposed Residential Units	% of Proposed Res Units	Proposed Non Residential GFA (m^2)	% of Prop. Non-Res GFA
City of Toronto	**1,696**		**106,848**		**4,231,517**	
Total Priority Neighbourhoods	***162***	***9.6%***	***7,713***	***7.2%***	***359,490***	***8.5%***
Cresent Town	3	1.9%	372	4.8%	1,067	0.3%
Dorset Park	13	8.0%	120	1.6%	7,301	2.0%
Eglinton East-Kennedy Park	9	5.6%	1	0.0%	8,625	2.4%
Flemingdon Park-Victoria Village	16	9.9%	383	5.0%	17,985	5.0%
Jamestown	4	2.5%	0	0.0%	2,431	0.7%
Jane-Finch	30	18.5%	304	3.9%	79,290	22.1%
Kingston-Galloway	10	6.2%	215	2.8%	2,104	0.6%
Lawrence Heights	26	16.0%	2,303	29.9%	25,775	7.2%
Malvern	9	5.6%	44	0.6%	1,957	0.5%
Scarborough Village	7	4.3%	1,075	13.9%	15,261	4.2%
Steeles-L'Amoureaux	14	8.6%	1,346	17.5%	67,276	18.7%
Westminster-Branson	6	3.7%	253	3.3%	17,735	4.9%
Weston Mt. Dennis	15	9.3%	1,297	16.8%	112,682	31.3%
Stage of Development						
Projects Submitted (not approved)	48	29.6%	4,306	55.8%	200,920	55.9%
Projects Approved (no permits issued)	57	35.2%	3,344	43.4%	68,159	19.0%
Projects with Permits Issued	57	35.2%	63	0.8%	90,411	25.1%

Source: City of Toronto, City Planning: Land Use Information System

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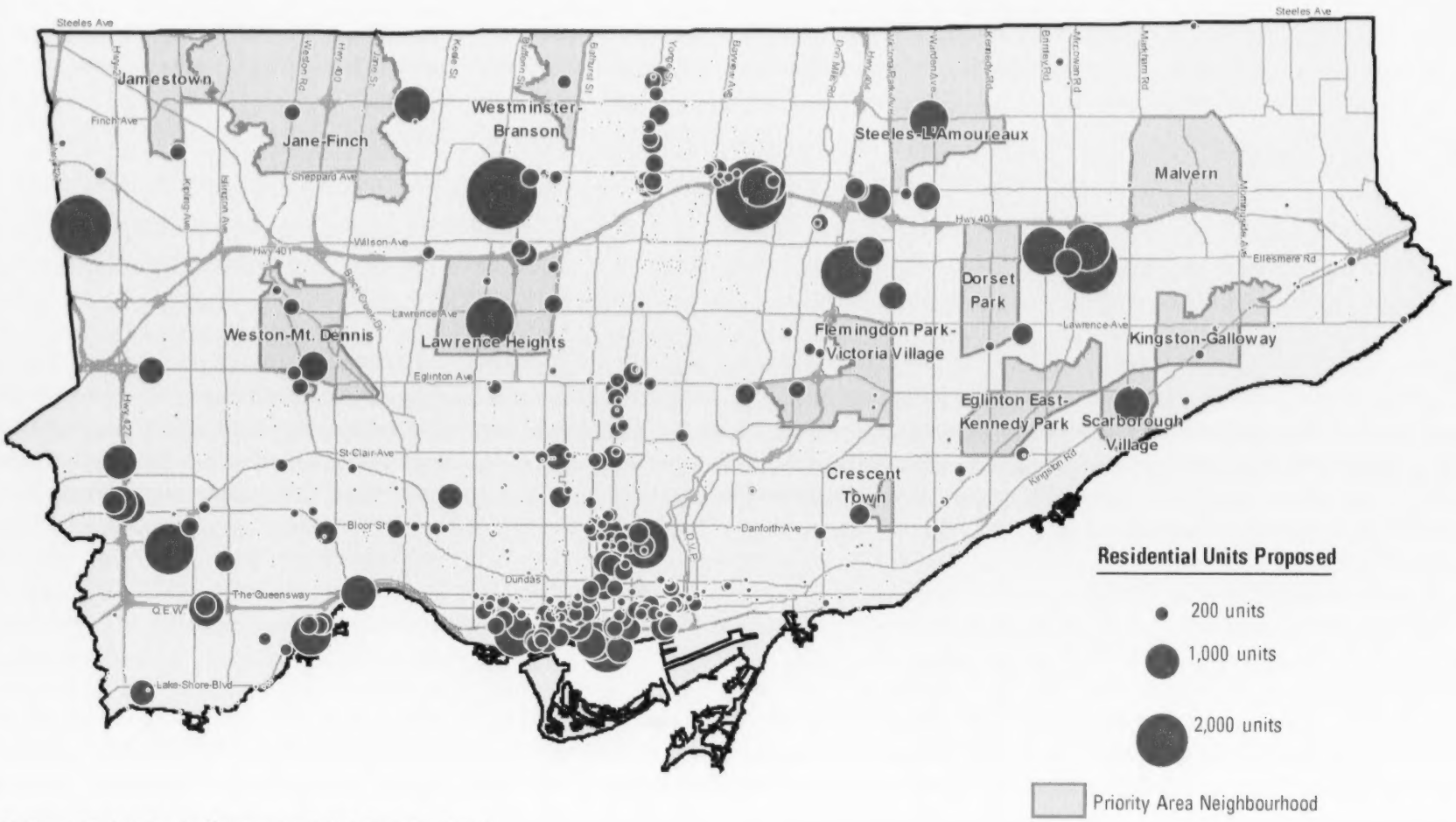
Map 5: City of Toronto Residential Development and Priority Area Neighbourhoods



Development Projects Received between June 1, 2006 - December 31, 2010

Source: Land Use Information System

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for the Lawrence-Allen area, which is located within this Priority Area. The Priority Area already has 2,303 units and 25,775 m^2 of non-residential GFA proposed and the forthcoming Secondary Plan for the Lawrence-Allen area should bring even greater redevelopment and revitalization to the neighbourhood.

Toronto Office Market

In the face of the third year of a worldwide economic slowdown, the Toronto office market continues to perform very well. Unlike most cities in North America, Toronto is both constructing new office buildings, and building them in the downtown area, as opposed to the outlying suburban areas around the city. In the past two years, the Toronto office market has added over 459,000 m^2 of GFA in six new buildings, all of which are in the downtown area.

Despite this large amount of new office space, which exceeds all of the office space constructed in the City in the previous ten years, office vacancy rates have not risen substantially, as existing firm growth has taken up much of this new space. Toronto's vacancy rate declined throughout 2010 and the downtown market remains healthy as top quality building space (Class A) had a vacancy rate of 5.6%, which was lower than the city as a whole.[7] The downtown area continues to be the centre of construction and leasing activity as it contains about 40% of all the office space found in the GTA.

Another key indicator of an area's economic health is the rent charged for office space. Rents for Class A buildings in downtown Toronto have risen by an average of about 5% throughout 2010. This compares to a decrease of just under 2% for similar buildings in the rest of the GTA.[8] According to one Toronto brokerage firm, rents for downtown Class A buildings have almost returned to their pre-recession levels, with an increase of nearly $10.00 per square foot in 2010.[9]

How the Data is Collected

The development information presented in this bulletin was extracted from the Land Use Information System, maintained by the City's Research & Information Unit of the City Planning Division. Staff collect detailed information from every development application received by the Division, as well as any revisions to the applications made throughout the Planning process. Information is also collected from building permit applications. The result is a rich body of data describing the location and built form of development projects across the City of Toronto throughout each stage of development. This information is accessible through the City's Development Application Status website:

www.toronto.ca/planning/developmentapplications

7. Cushman & Wakefield, Market Snapshot, Quarterly Reports.
8. Cushman & Wakefield, Market Snapshot, Quarterly Reports.
9. CBRE CB Richard Ellis, Global Office Developemnt Cycle, December 2010.

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